Software User's Manual

Transportation Grant Fund Database

Team #14

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1. Introduction

1.1 System Overview

Transportation Grant Fund Database (TGFD) system is a project management system designed to help manage Los Angeles department of Transportation (LADOT) projects. Main purpose of the system is to store projects' information and documents, keep track of the project status, improve communication between projects team members and generate quarterly reports.
System is based on the Microsoft SharePoint 2010 and Project Management (PM) Central plug-in to it. Thus the system provides all the standard functionality available in SharePoint and PM Central. Description of these functionalities can be found in corresponding manuals.
SharePoint 2010 Resources for End Users:
http://sharepoint.microsoft.com/en-us/resources/Pages/End-User-Training-Guide.aspx

SharePoint Project Management Central for SharePoint 2010 Documentation:
http://store.bamboosolutions.com/onlinedoc/Default.aspx#AppID=1780

1.2 System Requirements

TGFD system is server-client web-based application and thus it has very basic requirements for the user's machine.

1.2.1 Hardware Requirements

Hardware requirements are defined by the Windows 7 hardware requirements which are*:

- 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- 1 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit)
- 16 GB available hard disk space (32-bit) or 20 GB (64-bit)
- DirectX 9 graphics device with WDDM 1.0 or higher driver

* according to http://windows.microsoft.com/en-US/windows7/products/system-requirements

1.2.2 Software Requirements

- Windows 7
- Internet Explorer 8 or 9
- Acrobat Reader 9.0 or X

1.2.3 Other Requirements

- LADOT intranet access (either directly or through the Internet and VPN)

2. Installation Procedures

There is no installation procedure for users because the system should be used directly through the Internet Explorer browser without installation.
For the server side installation refer to the Administrator manual.

2.1 Initialization procedures

Not applicable.

2.2 Re-installation

Not applicable.

2.3 De-installation

Not applicable.

3. Operational Procedures

SharePoint 2010 Resources for End Users:
http://sharepoint.microsoft.com/en-us/resources/Pages/End-User-Training-Guide.aspx

SharePoint Project Management Central for SharePoint 2010 Documentation:
http://store.bamboosolutions.com/onlinedoc/Default.aspx#AppID=1780

Here is a description of some of the basics steps you can do using the system:

1. Login to the System

1. Type in http://10.94.14.117/PMC in address bar of Internet Explorer
2. Enter username and password

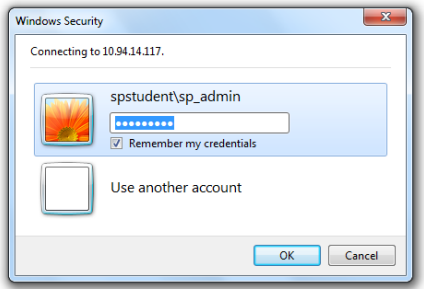


Figure 1: Log in

3. You will be redirected to the main PM Central page (Portfolio)

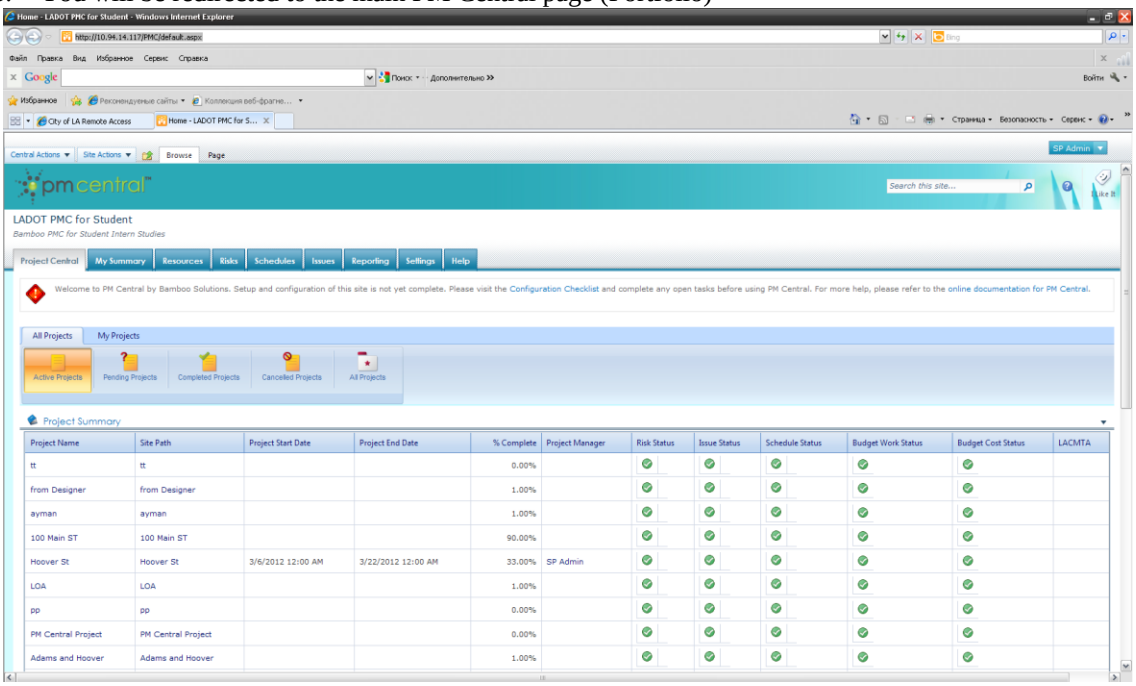


Figure 2: Portfolio Page

2. Log out:

To log out from the system press an arrow at the top right corner and press Sign out in the drop down menu:

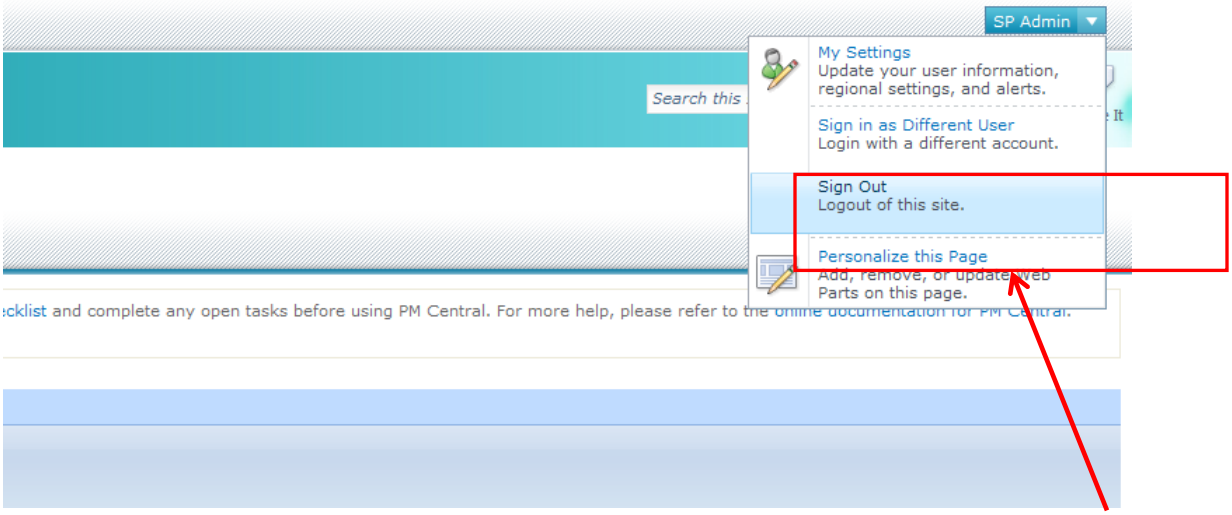

SP Admin
My Settings
Update your user information, regional settings, and alerts.
Sign in as Different User
Login with a different account.
Sign Out
Logout of this site.
Personalize this Page
Add, remove, or update Web Parts on this page.
Search this

Figure 3: Sign Out

3. Create New Project

In order to create a new project

1. Click Central Action -> Add New Project

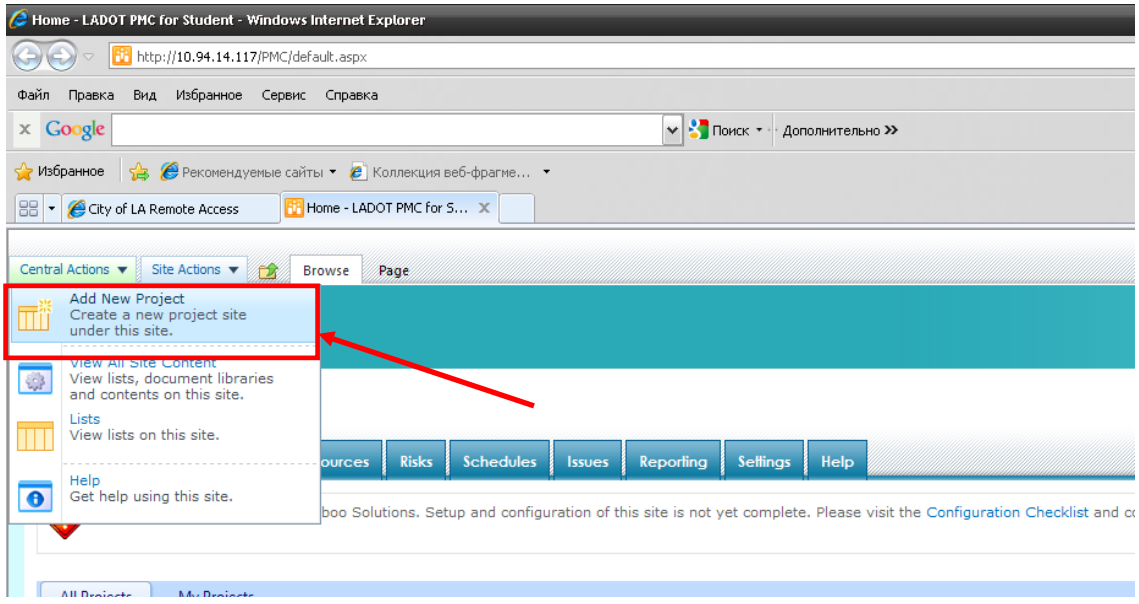


Figure 4: Add New Project

2. Fill in project information at the project creation page:
   Type in Title
   Leave Use default permissions as is
   Choose Quarterly Report Project at Site template multiple choice field:

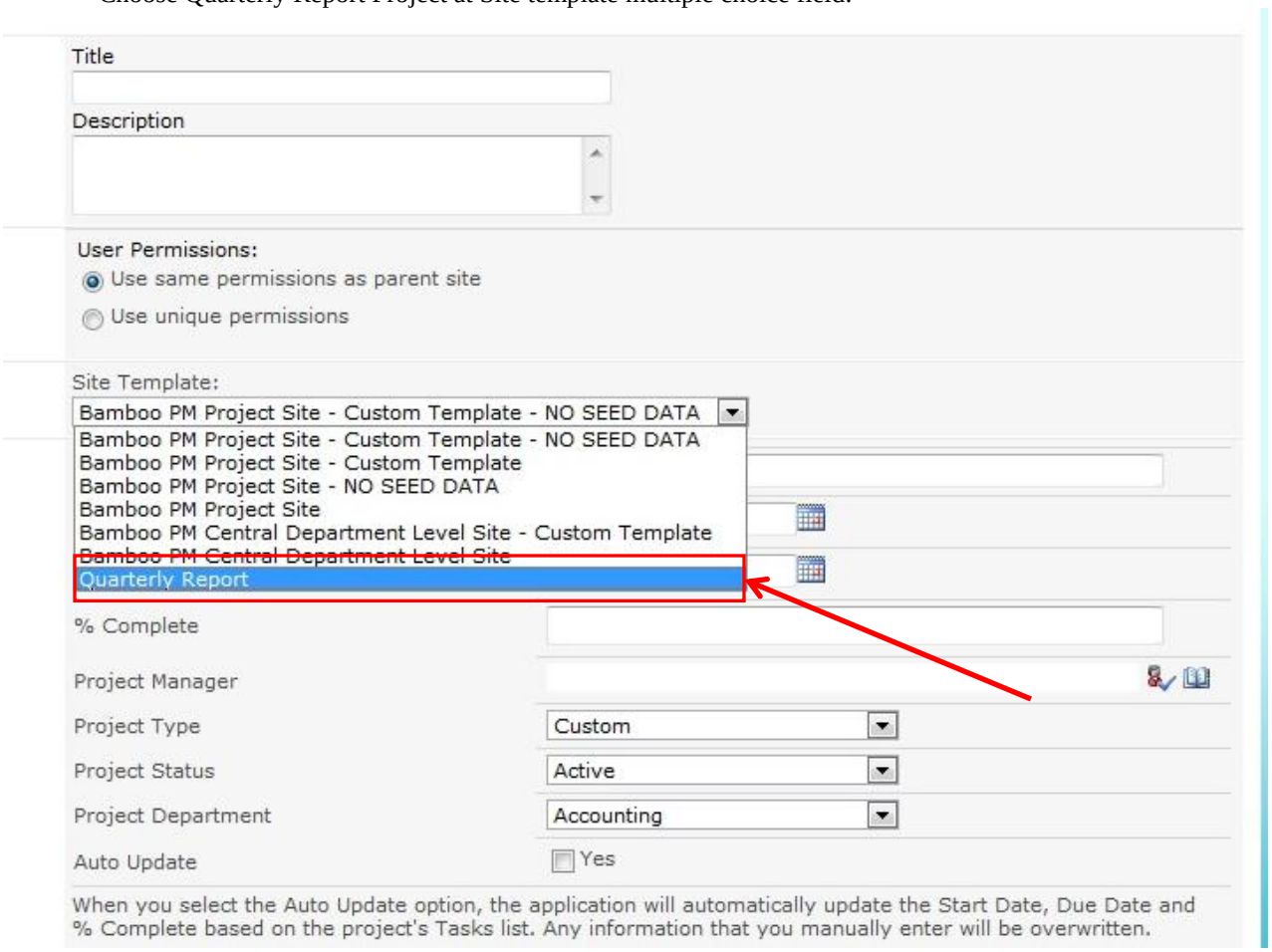

Title
Description
User Permissions:
Use same permissions as parent site
Use unique permissions
Site Template:
Bamboo PM Project Site - Custom Template - NO SEED DATA
Bamboo PM Project Site - Custom Template - NO SEED DATA
Bamboo PM Project Site - Custom Template
Bamboo PM Project Site - NO SEED DATA
Bamboo PM Project Site
Bamboo PM Central Department Level Site - Custom Template
Bamboo PM Central Department Level Site
Quarterly Report
% Complete
Project Manager
Project Type
Custom
Project Status
Active
Project Department
Accounting
Auto Update
Yes
When you select the Auto Update option, the application will automatically update the Start Date, Due Date and % Complete based on the project's Tasks list. Any information that you manually enter will be overwritten.

Figure 5: Choose Site Template

and click Create

3. You will be redirected to the Project Home page

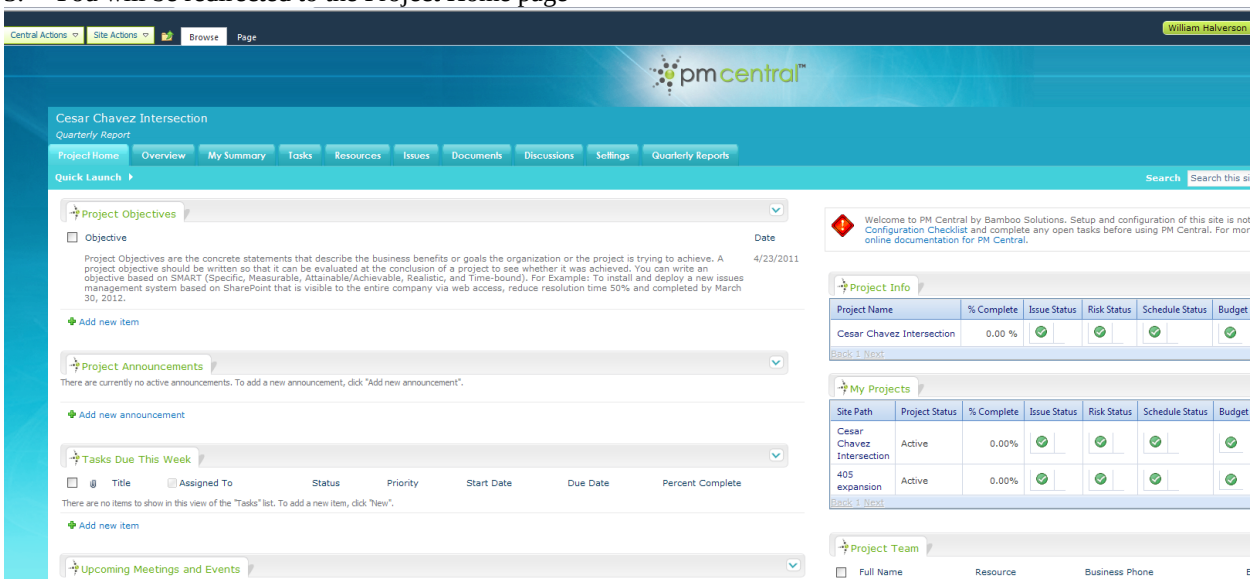


Figure 6: Project Home page

4. Create Report

1. Click Quarterly Reports tab button

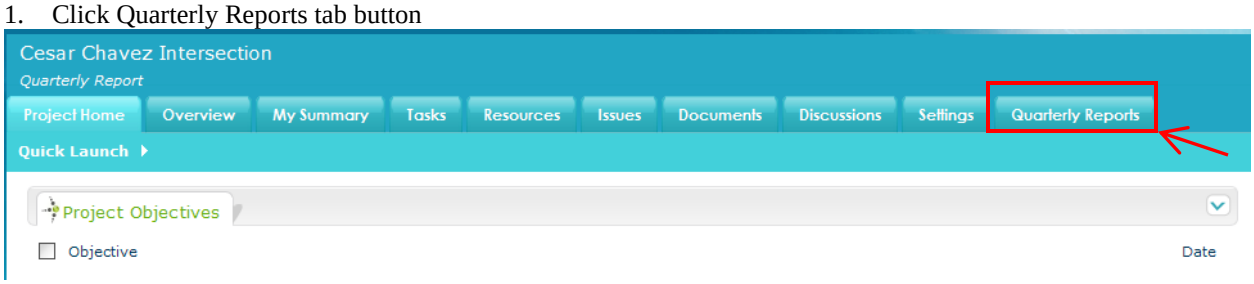


Figure 7: Quarterly Report tab

2. You will be redirected to the Quarterly Reports Library page.
3. Click “Add document” button to create a report

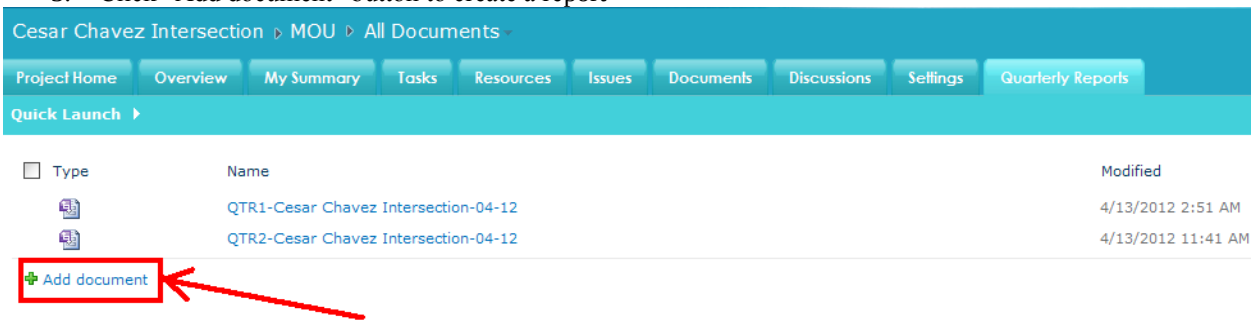


Figure 8: Add report

4. Quarterly report form will appear. Fill in the form and click Submit

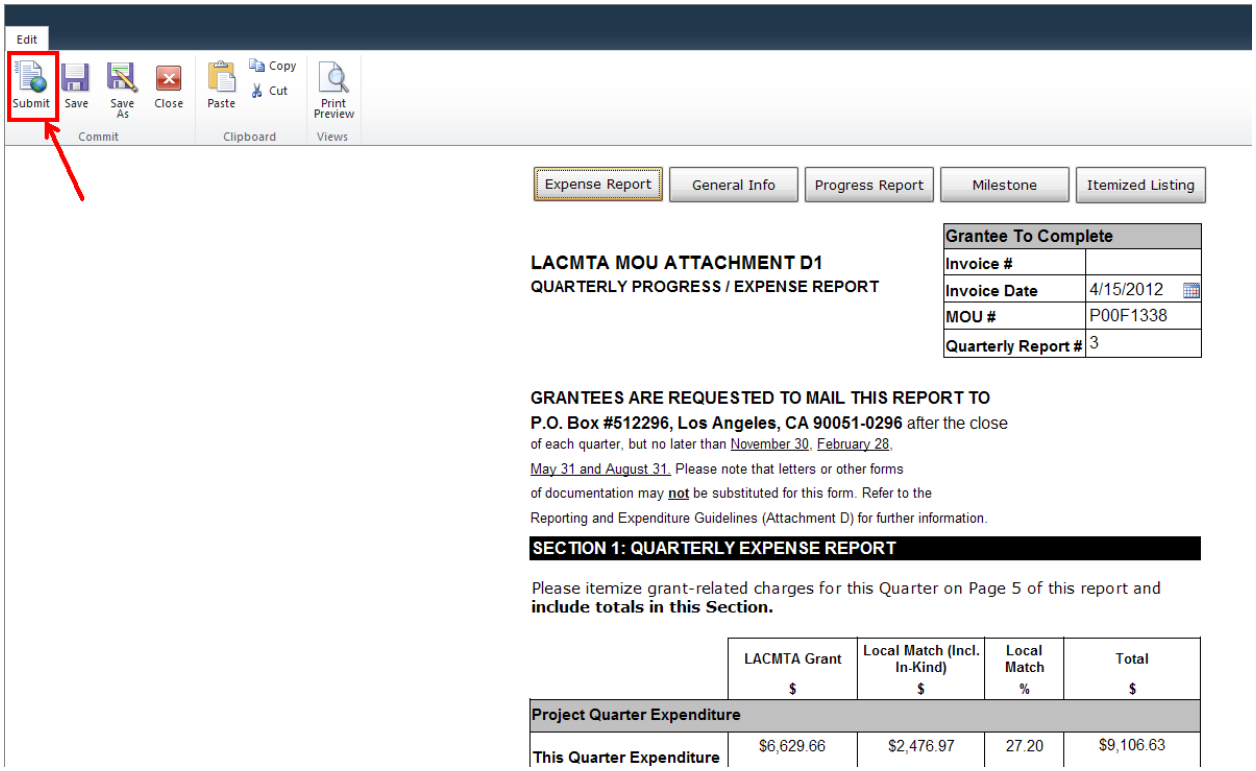


Figure 9: Quarterly Report form

5. InfoPath version of the Quarterly report will appear in the library and pdf version will be added to the document library at the main page

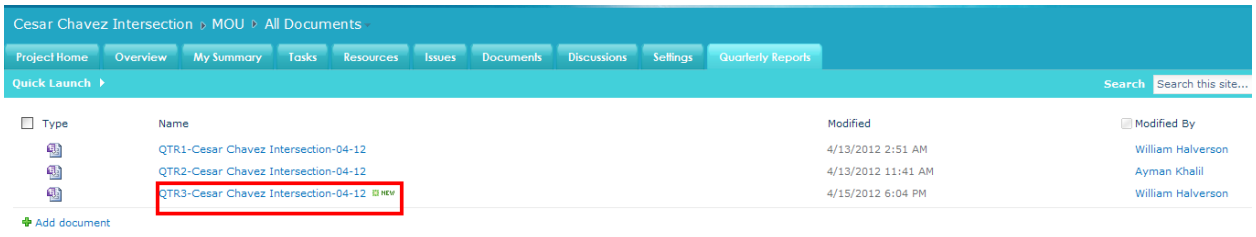


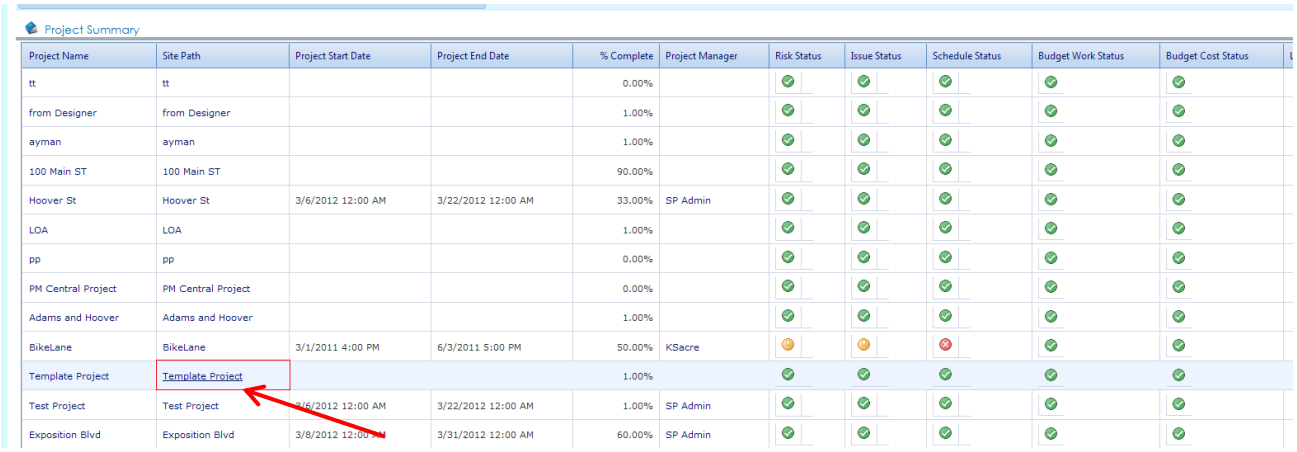
Figure 10: MOU library

5. View an Existing Report

In order to view an existing report simply click on a report in a library list (Fig. 10)

6. View Existing Projects:

1. Go to the Portfolio page of the PM central (http://10.94.14.117/PMC/)
2. Choose the project form the Project Summary table and click on the Site Path (second column) of this project



Project Summary

Project Name	Site Path	Project Start Date	Project End Date	% Complete	Project Manager	Risk Status	Issue Status	Schedule Status	Budget Work Status	Budget Cost Status
tt	tt			0.00%						
from Designer	from Designer			1.00%						
ayman	ayman			1.00%						
100 Main ST	100 Main ST			90.00%						
Hoover St	Hoover St	3/6/2012 12:00 AM	3/22/2012 12:00 AM	33.00%	SP Admin					
LOA	LOA			1.00%						
pp	pp			0.00%						
PM Central Project	PM Central Project			0.00%						
Adams and Hoover	Adams and Hoover			1.00%						
BikeLane	BikeLane	3/1/2011 4:00 PM	6/3/2011 5:00 PM	50.00%	KSacre					
Template Project	Template Project			1.00%						
Test Project	Test Project	3/6/2012 12:00 AM	3/22/2012 12:00 AM	1.00%	SP Admin					
Exposition Blvd	Exposition Blvd	3/8/2012 12:00 AM	3/31/2012 12:00 AM	60.00%	SP Admin					

Figure 11: List of projects

3. You will be redirected to the Project Home page (Fig. 6)
4. To see Quarterly Reports click Quarterly Report tab (Fig. 7)
5. You will be redirected to the Quarterly Report library.
6. Click on the report you want to see (Fig. 10).

7. Add a New Task:

1. On Project Home page go to the task Due This Week Web part

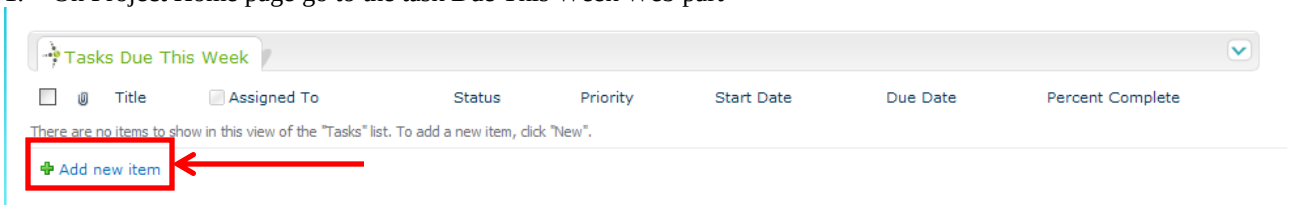


Figure 12: Add New Task

2. Click Add new item

3. New Item form will appear. Fill in and click Save

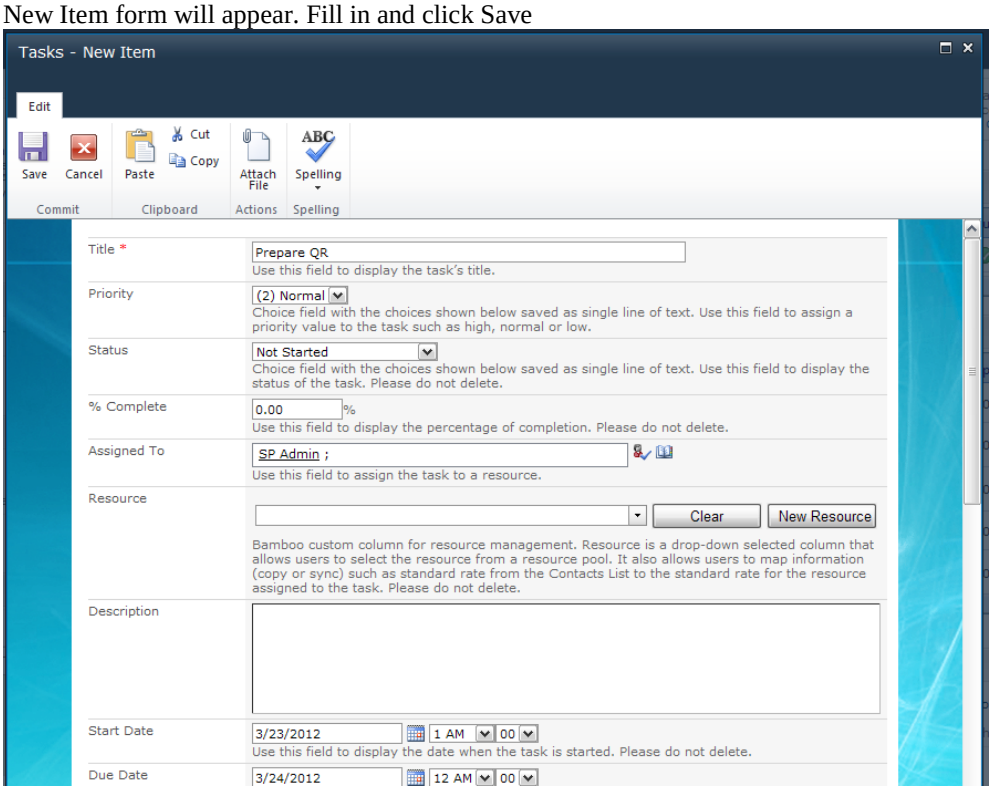

Tasks - New Item
Edit
Save
Cancel
Paste
Cut
Copy
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Title *
Prepare QR
Use this field to display the task's title.
Priority
(2) Normal
Choice field with the choices shown below saved as single line of text. Use this field to assign a priority value to the task such as high, normal or low.
Status
Not Started
Choice field with the choices shown below saved as single line of text. Use this field to display the status of the task. Please do not delete.
% Complete
0.00
%
Use this field to display the percentage of completion. Please do not delete.
Assigned To
SP Admin ;
Use this field to assign the task to a resource.
Resource
Clear
New Resource
Bamboo custom column for resource management. Resource is a drop-down selected column that allows users to select the resource from a resource pool. It also allows users to map information (copy or sync) such as standard rate from the Contacts List to the standard rate for the resource assigned to the task. Please do not delete.
Description
Start Date
3/23/2012
1 AM
00
Use this field to display the date when the task is started. Please do not delete.
Due Date
3/24/2012
12 AM
00

Figure 13: New Task form

8. Attach the Document

1. Click “Add Document” button on the bottom left of the Project Home page

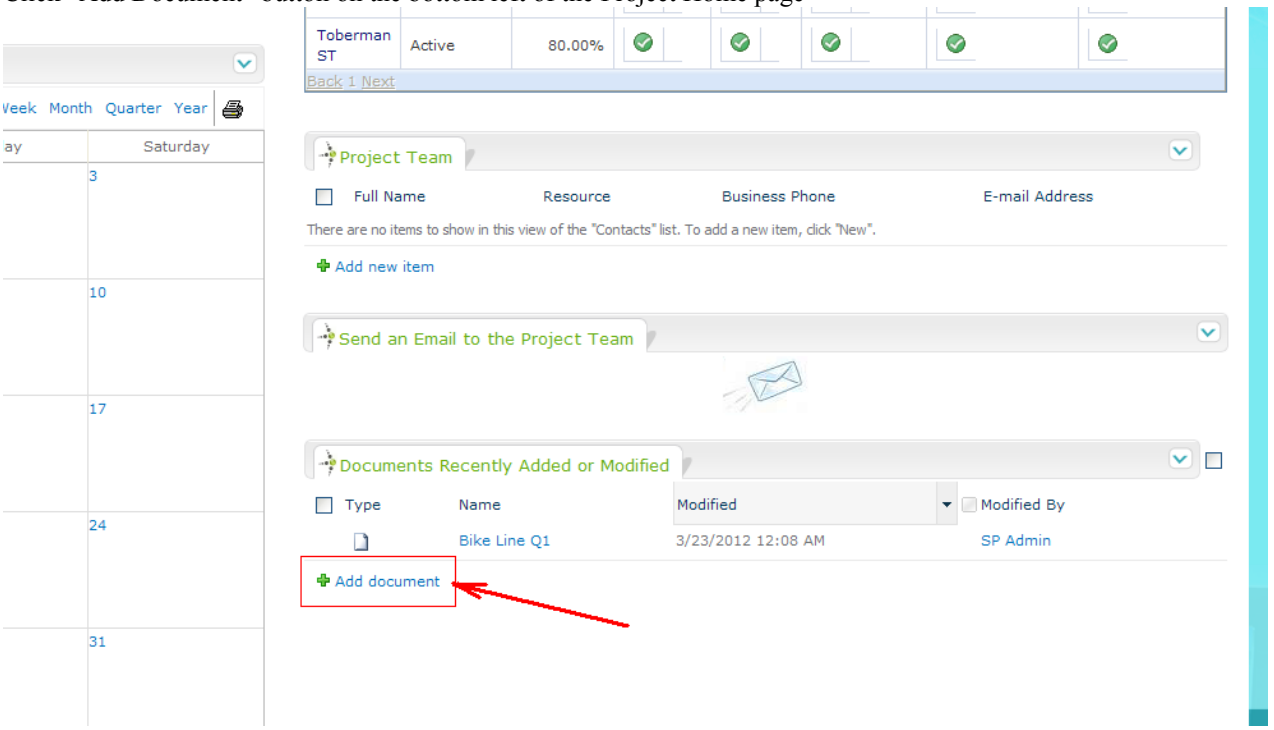


Figure 14: Add Document

2. Choose the document and press OK

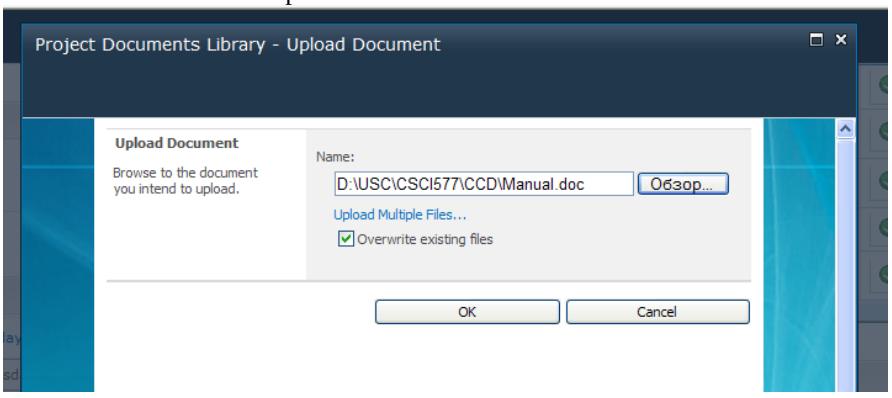


Figure 15: Choose document for upload

9. Download Document

1. Click on a document name in the document list:

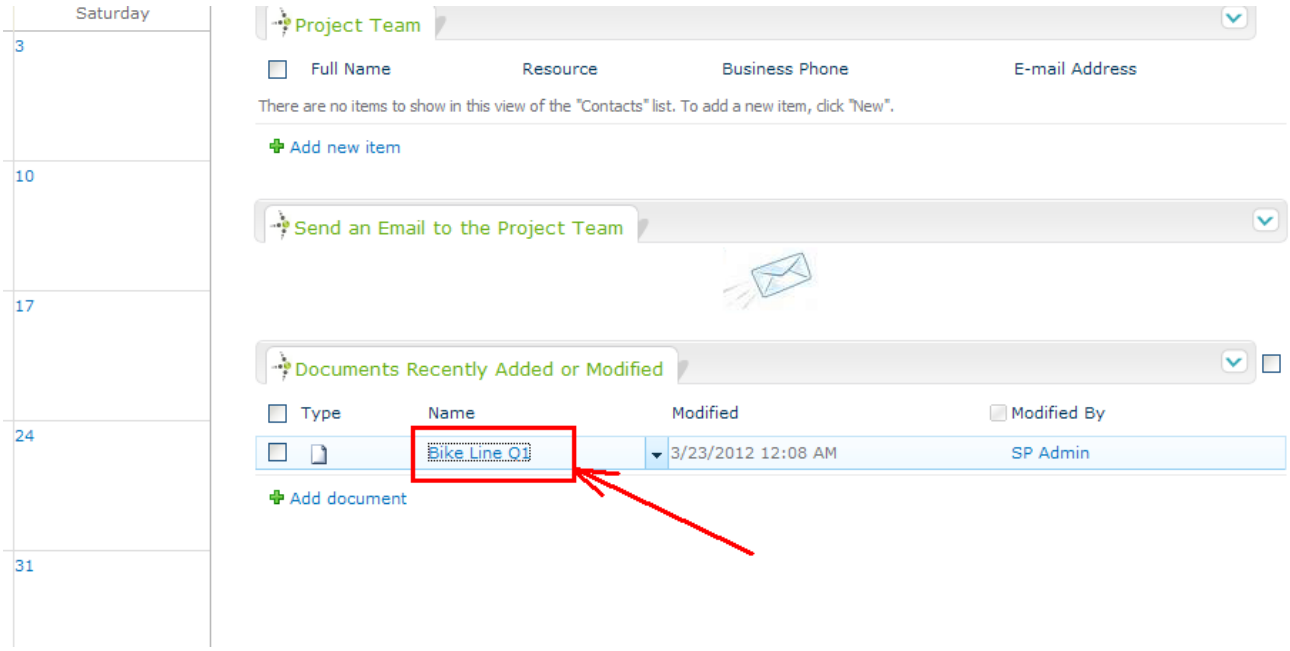


Figure 16: Download Document

2. Save document on your hard disk.

10. Delete Document

1. Hover the mouse on the name of the document you want to delete and click on the appeared arrow:

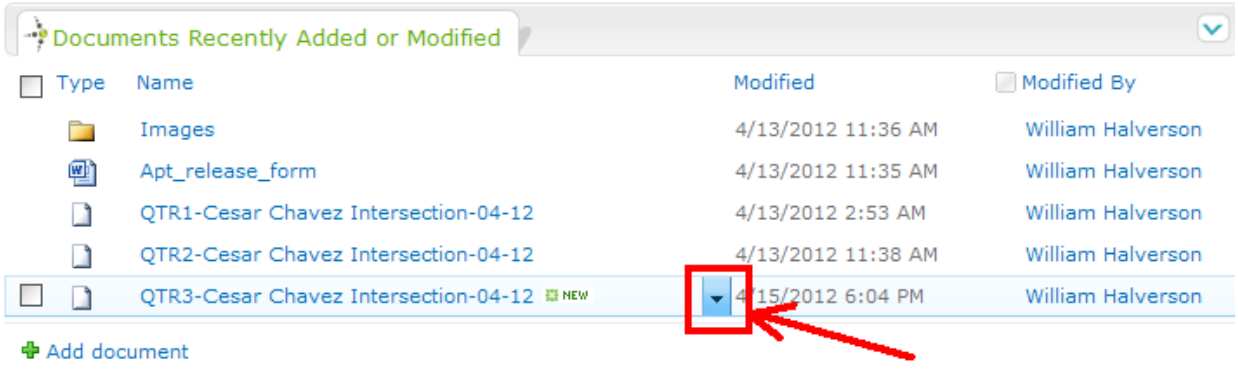


Figure 17: Document Options

2. Click Delete in the pop-up menu

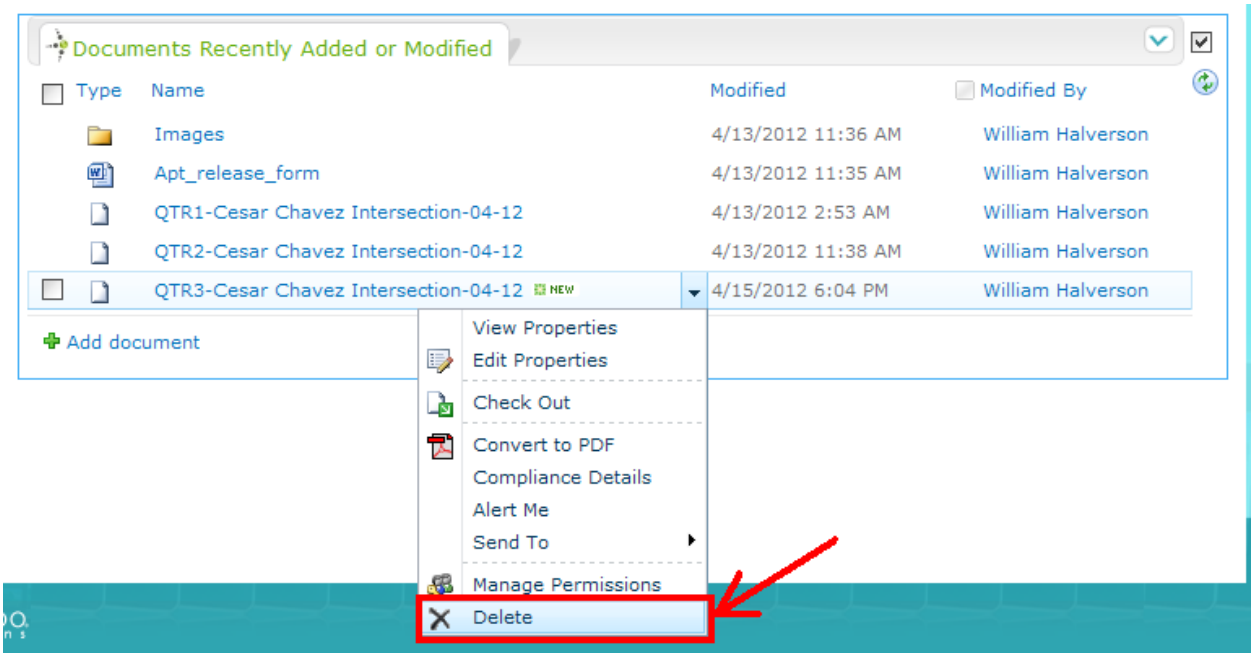


Figure 18: Delete Document

3. Click OK in the conformation message

9. Send Email

1. Go to Project Home page (see 6. View Existing Projects, Fig.11)
2. Click on the envelop picture at "Send an Email to the Project Team" web part

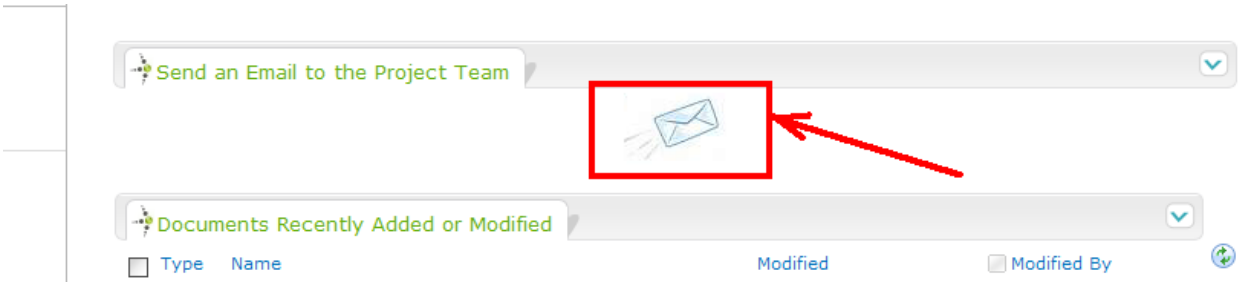


Figure 19: Send an Email

3. Fill in email form and click send

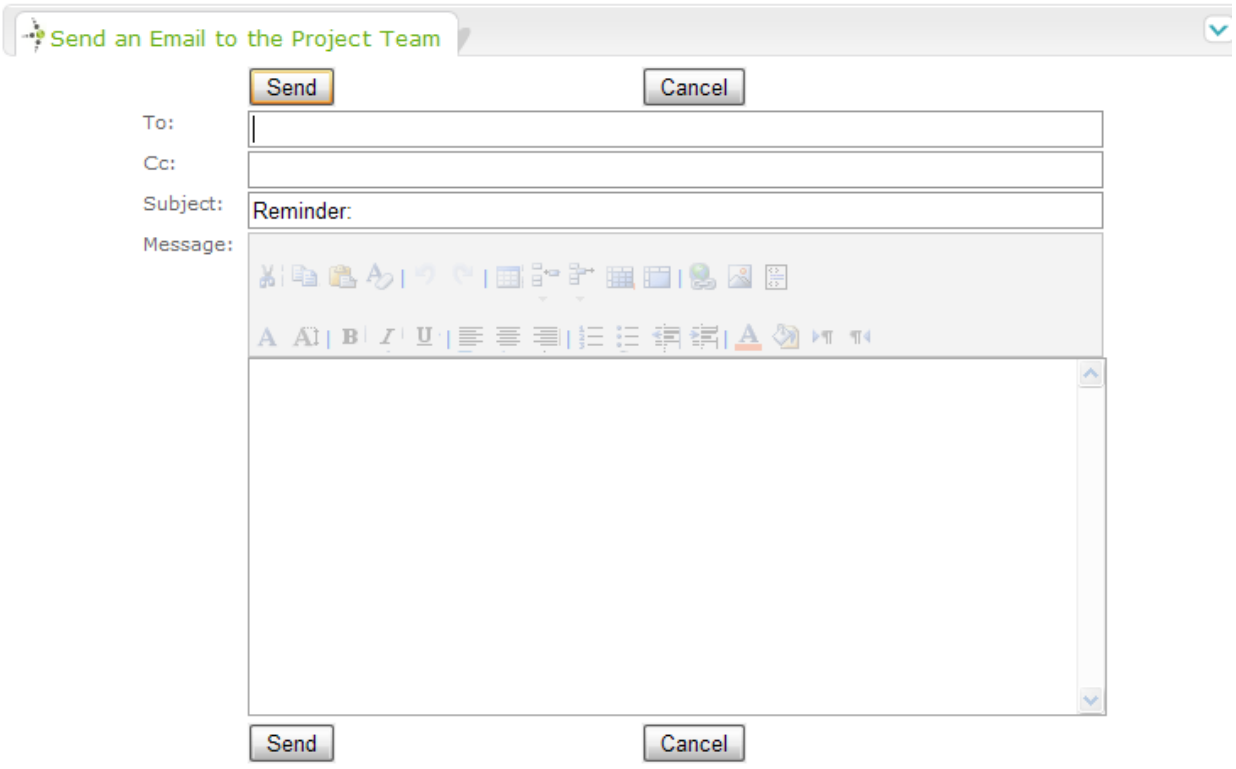


Figure 20: Email Form

4. Troubleshooting

If you have any troubles using software or have additional questions you can contact Mony Patel at mony.patel@lacity.org or Richard Harada at richard.harada@lacity.org .

4.1 Frequently Asked questions

How can I change fields' values that are read only in the Quarterly Report form (e.g. MOU number)?

In order to change these fields' value you have to edit Project Information. From the Project Home page click on the project name in Project Info list and edit fields you want to change.

What is the difference between Submit and Save buttons in the Quarterly Report form?

Submit button creates a pdf version of the report in addition to saving it.

Where I can find a pdf version of the report?

Pdf version of the report is saved in the main project library which you can find at the project home page.

4.2 Error Codes and Messages

Error: Access Denied

This error means that you don't have permissions to access this page. Please contact Project Coordinator to resolve this issue.

HTTP 404: The page cannot be found

Your URL is incorrect or your have a network problem. Try to use different URL or contact system administrator.

4.3 Note

TGFD – Transportation Grant Fund Database
LADOT – Los Angeles Department of Transportation
SharePoint – Microsoft SharePoint 2010
PM Central – Project Management Central